



Self-Directed Services Newsletter

"People do not need training to be
Self-Determined. They need the opportunity to
exercise their rights and fulfill their responsibilities."
SDS Participant

September 2006

Volume 1, Number 2

Feature Article

Chatting with Maria Marquez

Updates

- Self-Directed Services Update
- Individual Budget Methodology
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**Go to our website
for the most up to
date information on
Self-Directed
Services.**

Chatting with Maria Marquez about Self-Determination



Maria was a participant in the Self-Determination Pilot Project. Gina De La O is the DDS staff member conducting the interview.

GINA: *How has SDS been working for you?*

Maria: "Great, I couldn't ask for anything better!"

GINA: *What has changed for the better?*

Maria: "Because of SDS, my needs were met. With some support, I am able to have a full-time job and live independently with my two daughters."

GINA: *Did anything change for the worse?*

Maria: "In the beginning, it took a long time for my support people to get paid. Because it was a new program, we just needed to get organized."

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GINA: *How did you go about choosing the people who work for you?*

Maria: "I asked friends and family to help me find people, then I interviewed them."

GINA: *What services do they provide to you?*

Maria: "They help me with my personal needs like shopping, helping around the house, and sometimes babysitting when I have a lot of meetings and presentations."

GINA: *Was it hard to complete your Individual Program Plan? If so, what type of assistance did you receive?*

Maria: "The first year was hard because I needed to plan for the whole year, but it got easier. My Supports Broker, Service Coordinator, and family helped me."

GINA: *Do you like having a Supports Broker help you? What does your Supports Broker do for you?*

Maria: "Yes, my Supports Broker helped me to find resources I didn't know about. She also helped me with my schedule, made phone calls, and got quotes on items and services for me. My Supports Broker helped me think about my needs and to be honest about what I needed. I also did some research myself."

* Special Note*

A Financial Management Service is designed to help the participant document incoming and outgoing individual budget funds and help distribute those funds.

GINA: *What does your Financial Management Service do for you?*

Maria: "They pay my support staff."

GINA: *Do you have enough money to purchase the services and supports you need?*

Maria: "Yes, but one time I had an emergency and needed 24-hour care. So the regional center stepped in to help me."

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GINA: *Do you have any advice you would like to give to someone considering Self-Directed Services?*

Maria: "Look into all the resources before you decide, and look at your needs for the whole year."

GINA: *Is there anything you would like to add?*

Maria: "If it wasn't for Self-Directed Services, I wouldn't be doing what I'm doing today and getting off of public benefits. I was the first person in the State of California to do Self-Directed Services, and I was viewed as a celebrity. The assembly person wrote a personal letter congratulating me. In addition, I got to be in a video about Self-Directed Services. I have done a lot of presentations about SDS and really enjoy public speaking."

Self-Directed Services Update



In order to implement Self-Directed Services (SDS) statewide, the DDS must complete three separate but related processes: 1) Submission and approval for an SDS Home and Community Based Waiver by the Federal Centers for Medicare & Medicaid Services (CMS); 2) Circulation of SDS regulations; and, 3) Implementation of CADDIS (a data system to track budget expenditures).

We at the DDS are in the last stages of developing final drafts of the Waiver and regulations. We will be soliciting public comment on these documents beginning Fall 2006. The dates, times, and process for providing comments will be posted on the DDS website.

To be clear, statewide SDS will not be implemented in this fiscal year (July 1, 2006 to June 31, 2007). The DDS considers CADDIS critical to the SDS program. Expansion of the program has been delayed as a result of setbacks in the implementation of CADDIS. Currently, the DDS plans to implement SDS in January of 2008.

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Once Self-Directed Services are available statewide, participants from the Self-Determination pilots may join. Consumers taking part in the current Self-Determination pilots may continue to receive Self-Determination services and are not required to move to Self-Directed Services.

Stay tuned as we provide future updates on the implementation date!

Self-Directed Services Individual Budget Methodology



When a Self-Directed Services participant needs to determine how much money will be available in his or her individual budget, a method (or methodology) is used to calculate this dollar amount. Participants in the Self-Directed Services program will have the opportunity to choose one of two individual budget amounts derived from two different methodologies.

One individual budget method takes into account a participant's annual purchase of services costs during the most recent twenty-four month period. The second budget methodology will be calculated by looking at the previous two fiscal years of someone with similar characteristics as the Self-Directed participant. These characteristics include age, type of residence, functional skills, behavior challenges, and whether the individual is in transition. Participants will most likely choose the second method if they have a history of low historical purchase of service levels or if they are new consumers entering the system without a history of services, or participants that experience a major transition in life, such as moving out of a parent's home.

Both budget methodologies described above provide an average of historical purchase of service expenditures. Of this average, 90% will be used for an individual to purchase needed services and supports. Of the 10% remaining, 5% is returned to the General Fund as a cost savings. The other 5%

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of the average goes to the risk pool fund. The risk pool will be available to assist participants with unanticipated needs which were not known at the time the IPP was developed and the budget finalized. These unanticipated needs may be a result of an urgent need to relocate or a catastrophic illness or injury.

The Department of Developmental Services (DDS) has enlisted the professional expertise of Stanley Taylor, Ph.D. and Amy Mickel, Ph.D. to help the DDS develop a methodology that will determine a participant's maximum annual individual budget amount and to finalize the second budget methodology.

Dr. Taylor holds a doctorate in Decision Science from the University of Oregon. As a professor in the Department of Management Information Science at Sacramento State University, he teaches undergraduate and graduate classes in Business Statistics and Introduction to Management Information Systems. His research interests are in the area of statistical analysis. Dr. Taylor has conducted a number of economic impact studies for the DDS and the Department of Social Services. For the last 12 years, he has provided expertise to the DDS regarding time series forecasting for the budget.

Dr. Mickel received her doctorate in Organizational Behavior and Human Resource Management from the University of Washington. As a professor in the College of Business Administration at Sacramento State University, she teaches Organizational Behavior at both the undergraduate and graduate level. Her research has been published in a number of well-respected management journals with international audiences. She has been working with the DDS for the last three years on quality of life studies and money-related individual differences.

Since they joined the DDS team, substantial progress in the development of the methodology has been made. We will be sure to keep you posted regarding the exciting developments with the Individual Budget Methodology in future articles of this newsletter.

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Individual Providers



* Special Note*

A Quality Management System is a system of checks, skill development, and supports that serve to safeguard the health and well-being of an individual.

The March 2006 article "Individual Providers: A Guide to Employing Individual Providers Under Participant Direction"* mentions several key areas to assist states when developing a Quality Management System for Self-Directed Services. These areas include:

- qualities and competencies
- person-centered planning
- consumer safeguards
- quality assurances and improvement

The article says that participants in self-directed services stand to greatly benefit from using individual providers of their choice. Under traditional services, the provider agency decides who provides the service. In participant-directed services, the individual and/or family member chooses his or her own providers. The individual may hire neighbors or friends who are people they know and trust. The hiring of non-traditional providers has the added benefit of increasing the pool of available providers.

The article goes on to say that assurance of quality under participant direction will require "minimum provider qualifications, skills training, and safeguards for the health and well-being of participants." The article can be found at http://hcbs.org/files/91/4503/Individual_Providers_final.pdf

* June Rowe et al., "Individual Providers: A Guide to Employing Individual Providers Under Participant Direction," *National Quality Contractor*, March 2006.

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Training Update



[NASDDDS Conference](#)

The National Association of State Directors of Developmental Disabilities Services (NASDDDS) held its yearly *Reinventing Quality Conference*, called *Supporting Valued Lives: Participation, Quality, and Accountability*, on February 12-14 at the Bahia Resort Hotel in San Diego, California. The conference was broken into three main sections covering a wide range of topics in support of those with developmental disabilities. Among the many workshops was a presentation on San Diego Regional Center's Self-Determination Pilot Project. The presenters included Judy Wallace-Patton, Chief Counselor, San Diego Regional Center; Peggy Webb, Mosaic Connections Inc.; and Rojane Jackson, Community Interface Services.

The presenters provided information on their experiences implementing Self-Directed Services, including the development of independent brokerage and fiscal agent supports within their community. This dynamic presentation will be offered once again October 5, 2006, at the *Supported Life Institute Conference* in Sacramento.

The *Reinventing Quality Conference* panel also included Project Team staff. This project trains numerous transition age high school students to "Take Charge" of their lives and directs their IEP process within their schools as they enter adult services.

[CaITASH Conference](#)

The Association for Persons with Severe Handicaps, California (CaITASH) held its 24th annual conference at the San Francisco Airport Marriott in Burlingame, California, on February 3-4, 2006. The audience consisted mostly of professionals, but consumers and other interested participants were also present. Information on innovative strategies currently used to enhance the lives of those with disabilities was presented. While the focus of the conference was on the educational system, several organizations, including state and local governments, provided information on current programs available statewide.

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Presenters provided an overview and update on the status of the new Self-Directed Services (SDS) program during one of the many conference breakout sessions. One presentation included the personal experiences of Joe Nelson, a Redwood Coast Regional Center Self-Determination pilot participant. He elaborated on how the Self-Determination pilot project helped increase his independence and community involvement.

Margaret Anderson and Gina De La O from the Department of Developmental Services provided information about the unique features, services, and supports that will be offered in the SDS program. Bob Eickmeier, a Self-Determination Program Coordinator from Redwood Coast Regional Center, was another presenter. He elaborated on his experiences working exclusively with consumers who participate in the Self-Determination pilot project.

Resources



The main focus of CalTASH is on individuals with disabilities who are or who have been:

- most at risk for being excluded from the mainstream of society.
- perceived by traditional service systems as being most challenging.
- most likely to have their rights abridged.
- most likely to be at risk of living, working, playing, or learning in segregated environments.
- least likely to have the tools and opportunities necessary to advocate on their own behalf.
- most likely to need ongoing, individualized supports in order to participate in inclusive communities and enjoy a quality of life similar to that available to all citizens.
- historically labeled as having severe disabilities.

For more information, please visit the CalTASH website at:
<http://www.tash.org/chapters/caltash/>

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Frequently Asked Questions



DDS has answered the most frequently-asked questions from consumers, parents, regional center staff, and other individuals about Self-Directed Services (SDS). Please view our web page at www.dds.ca.gov/SDPP/pdf/FAQ.pdf to find those questions and answers. We hope you will find this information helpful. However, if you have additional questions or comments regarding the SDS program, please e-mail us at sdsp@dds.ca.gov

Contacts



To request an orientation or information about the Self-Directed Services program, please contact Gina De La O at the following location:

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